

# Retirement Counseling Appointment Request

All information is required. If a Request is incomplete, no appointment will be scheduled. If you have already met with a counselor, additional appointments are not necessary.

**Please type or print all information clearly.**

Member's Name: \_\_\_\_\_ Member's Sex: Female ☐ Male ☐  
Last First Middle

Home Mailing Address: \_\_\_\_\_  
Street Address  
City State Zip code

Social Security No: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_ Email Address: \_\_\_\_\_

*If you need information about purchasing Prior or Withdrawn Service or any other issues you wish to discuss during your appointment, please indicate such on the back of this form.*

Anticipated Retirement Date: Month \_\_\_\_\_ 1, Year \_\_\_\_\_. > > *Planning Purposes Only*

Anticipated Drop Enrollment Date: Month \_\_\_\_\_ 1, Year \_\_\_\_\_.

Work Phone: (\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_ Home Phone: (\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_ Cell Phone: (\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_

Department / Agency of Employment: \_\_\_\_\_

**➔ TRS Members Only Please complete this section:**

Number of sick days: \_\_\_\_\_ Current Contract Type > circle one: 12 mos. / 10 mos. / 9 mos.

Job Classification (Principal, Bus Driver, Teacher, etc.): \_\_\_\_\_

**List 2 site choices for your individual counseling appointment.**

1st Choice \_\_\_\_\_  
Location  
2nd Choice \_\_\_\_\_  
Location

**Mail this request form to:**

***RSA Field Services Division ♦ Attn: Appointments ♦ P. O. Box 302150 ♦ Montgomery AL 36130-2150***

- ♦ Your request will be *date stamped* upon arrival and processed in the order it was received.
- ♦ You will be notified by mail or email with a *confirmation letter* stating your **appointment date and time.**
- ♦ **Day and Time slots are filled in time order and are not subject to change.**
- ♦ No appointments will be made by phone and no faxes will be accepted.
- ♦ Remember: Walk-ins are always welcome at the office in Montgomery.

To **cancel** your appointment, please call the Retirement Systems of Alabama. Request to speak to someone in the Field Services Division. Cancellations should be made as soon as possible but no later than 1 week prior to the appointment. There is generally a waiting list for each appointment.

\*To receive a *confirmed appointment*, you must be **within 3 years of retirement eligibility**. If your file indicates otherwise, you will not be scheduled for a counseling appointment but will be notified of the inaction.

**■ Ret Prep Seminars:** *Ret Preps* are full-day retirement planning seminars and are offered throughout the state. Visit the RSA Web site for more information and registration forms.

Signature of Applicant: \_\_\_\_\_

Retirement Systems of Alabama  
[www.rsa-al.gov](http://www.rsa-al.gov)

For RSA Office Use Only:

Date: \_\_\_\_\_

Order: \_\_\_\_\_

Confirmed with Letter: \_\_\_\_\_